



DEOCS Portal: How to Register a Survey

Last Updated: 12/17/2020

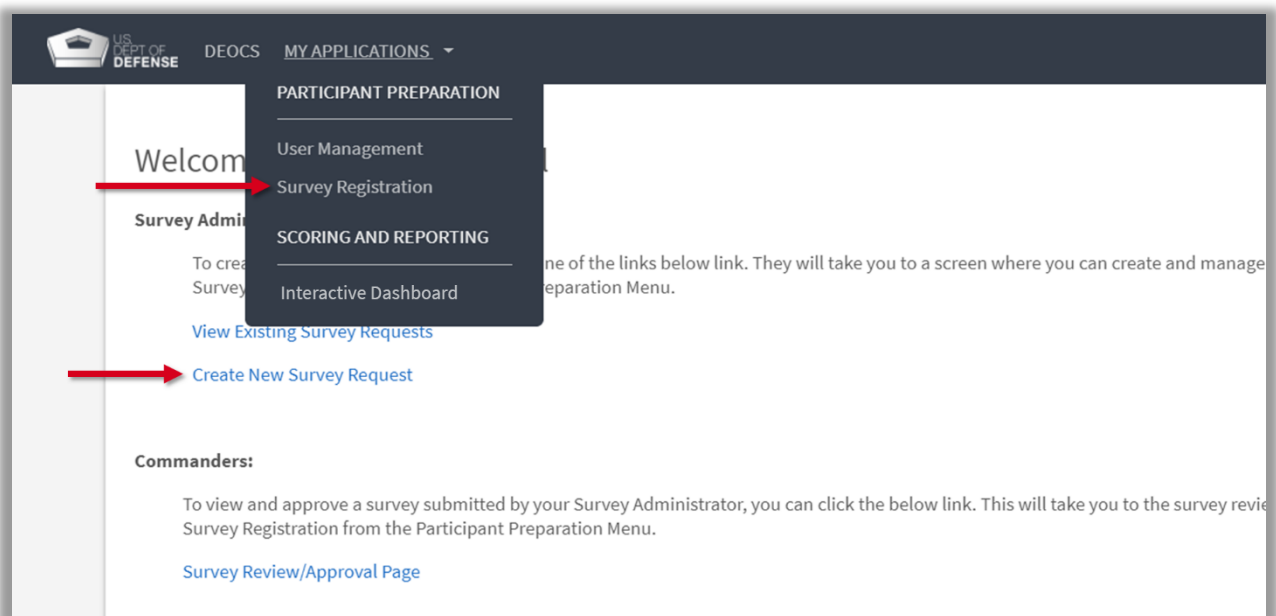
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How to Register a New Survey in the DEOCS Portal

Enter DEOCS Request Details

1. After logging in to your DEOCS Portal account (www.drcedirect.com/all/eca-portal-v2-ui/#/login/deocs), you will see two sections on the main screen, one with a link for survey administrators and one with a link for commanders. Under the Survey Administrators section, select the link to “Create New Survey Request” on the main body of the page. For best results, use Chrome. Internet Explorer is not a supported browser at this time.



Tip: You can also create a new survey request by clicking “View Existing Survey Requests” or going to “My applications - Survey Registration” in the top menu bar. From these pages, you can click the “Create a New DEOCS” button on the right side of the screen.

- 2. Enter the registration name.** The “registration name” will be saved in the DEOCS Portal account and referenced in the future as needed. Each request must have a registration name in order to save it as a draft. The registration name defaults to your last name and current date (example: “Smith 04.29.2020”). Create a unique and memorable name for your survey that includes identifying information such as the unit/organization or the commander so that you can easily locate it later.

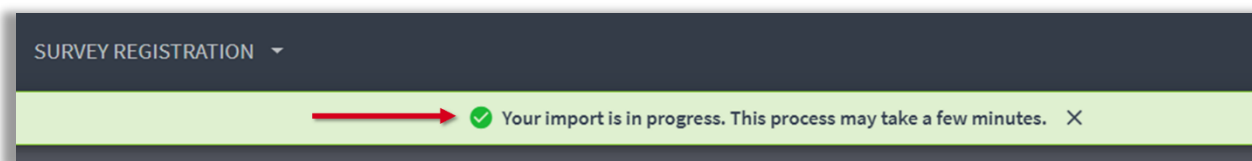
Tip: As you enter the survey request details, save the information as you go by clicking “Save as Draft” button. This will ensure your work is saved even if you log out of the system or are automatically logged out due to inactivity.

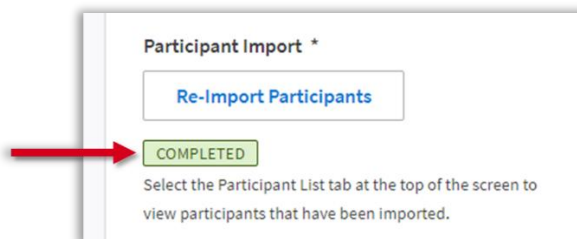


- 3. Click “Browse” underneath participant import and find your roster or drag and drop your file into the space provided.** All DEOCS requests require a survey administrator to create and upload a roster of all individuals in an organization that should receive a DEOCS. For more information on creating a roster, please read “Preparing to Register a Survey” on the Assessment to Solutions website: www.defenseculture.mil/Assessment-to-Solutions/A2S-Home/

- 4. Click “Start Import” button.**

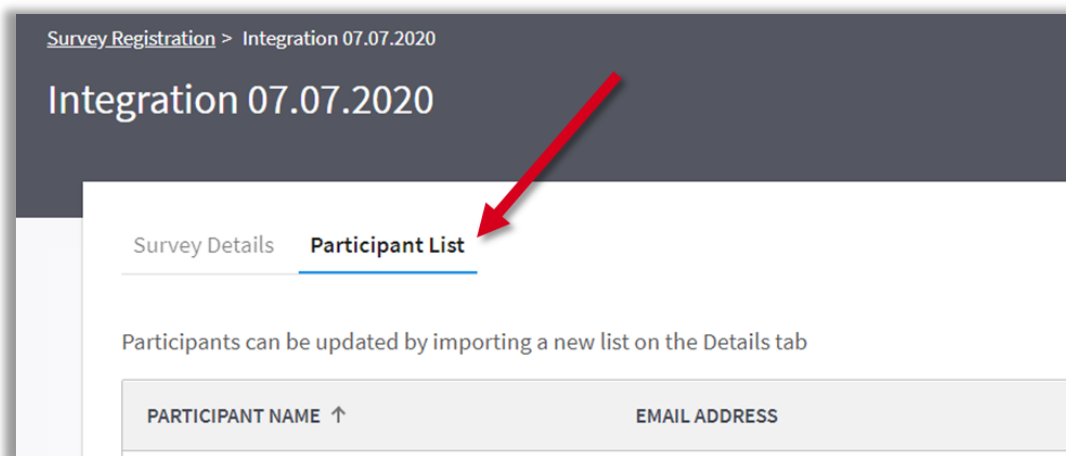
- Your roster may take a few minutes to upload.
- If your roster import was successful, you will see a green banner at the top of the screen letting you know the import is in progress. Once it is complete, you will see a green “Completed” message underneath participant import.





c) If your roster import was unsuccessful, follow the instructions in the error message to correct your roster and re-upload.

5. **Once the roster import is successful, click on the “Participant List” tab to verify the information you uploaded looks correct.**



6. **Click on the “Survey Details” tab to continue survey registration.**

7. **Complete the registration form with the following details based on the unit/organization that will receive the DEOCS.** Many of these options are dynamic, based on the Service Component you select. For example, if you select DoD as the Service Component, you will not be required to select a unit; however, if you select USA Active Duty, you will be required to select a unit.
 - Select Service Component from the drop-down menu
 - Select Command Level from the drop-down menu, if applicable
 - Select Unit from drop-down menu, if applicable
 - Select Unit Type from drop-down menu, if applicable
 - Enter the Unit Code (UIC / PAS / OPFAC)
 - Enter the Unit/Organization Title
 - Enter the Unit/Organization City
 - Select the Unit/Organization State from the drop-down menu
 - Enter the Unit/Organization Zip code
 - Select “Yes” or “No” for “Is Your Unit Deployed?” if applicable

- Select the reason for the DEOCS request in the Request Detail Options from the drop-down menu

8. Enter the commander's/leader's information for the unit/organization requesting a DEOCS.

- First name
- Last name
- Email - *Note: no spaces are allowed before or after the email address*
- Phone number

9. Enter the information for the commander's/leader's supervisor

- First name
- Last name
- Email - *Note: no spaces are allowed before or after the email address*
- Phone number

10. In the Survey Window section, enter the start date for the DEOCS. The Start Date will default to one week from the current date, but you can change it as needed. The survey will not start until the commander or leader of the unit/organization has approved it; they must login to the portal to approve or approve it from the email they receive, so please ensure you allow enough time for this to happen.

Tip: Start and end dates are based on Central Standard Time, so account for time zone differences when selecting your start and end dates.

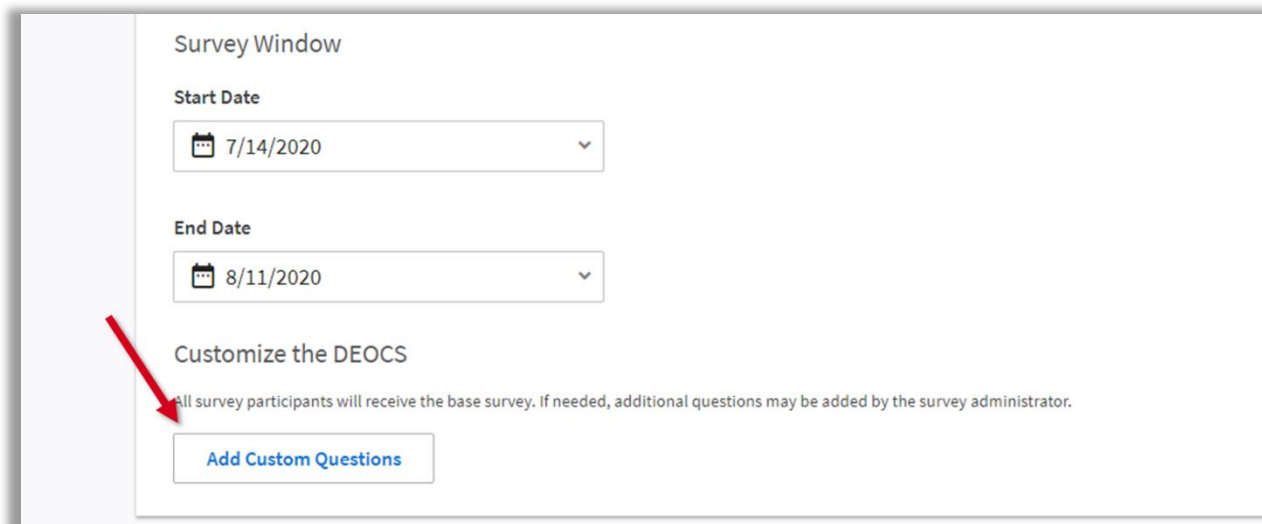
11. Enter the end date for the DEOCS. It will default to 4 weeks from the start date, but you can change it as needed. You can also update the end date even after the survey has started.

Tip: You cannot re-open a survey once it has closed, so it is important to monitor response rates while the survey is still open and extend the end date, if necessary. Please read "How to Manage a Survey in the Field" on the Assessment to Solutions website: <https://www.defenseculture.mil/Assessment-to-Solutions/A2S-Home/>

12. If you would like to customize the DEOCS with multiple choice questions (formerly known as locally developed questions or LDQs) or short answer questions, continue to step 13. If you do not want to customize the DEOCS with multiple-choice or short answer questions, skip to step 19.

Customize the DEOCS [Optional]

- 13. To customize the DEOCS with multiple choice (also known as locally developed questions or LDQs) or short answer questions, click the “Add Custom Questions” button.** Until a survey is approved by a commander, custom questions can be added, updated, or removed.



Survey Window

Start Date
7/14/2020

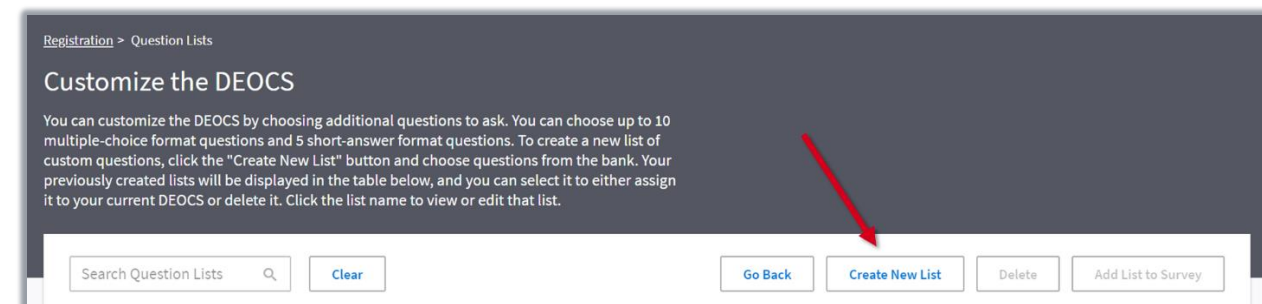
End Date
8/11/2020

Customize the DEOCS

All survey participants will receive the base survey. If needed, additional questions may be added by the survey administrator.

[Add Custom Questions](#)

- 14. Click the “Create New List” button.** If you have already created and saved a list of custom questions, you will see it in the table under “Question List Name.”



Registration > Question Lists

Customize the DEOCS

You can customize the DEOCS by choosing additional questions to ask. You can choose up to 10 multiple-choice format questions and 5 short-answer format questions. To create a new list of custom questions, click the “Create New List” button and choose questions from the bank. Your previously created lists will be displayed in the table below, and you can select it to either assign it to your current DEOCS or delete it. Click the list name to view or edit that list.

Search Question Lists [Clear](#)

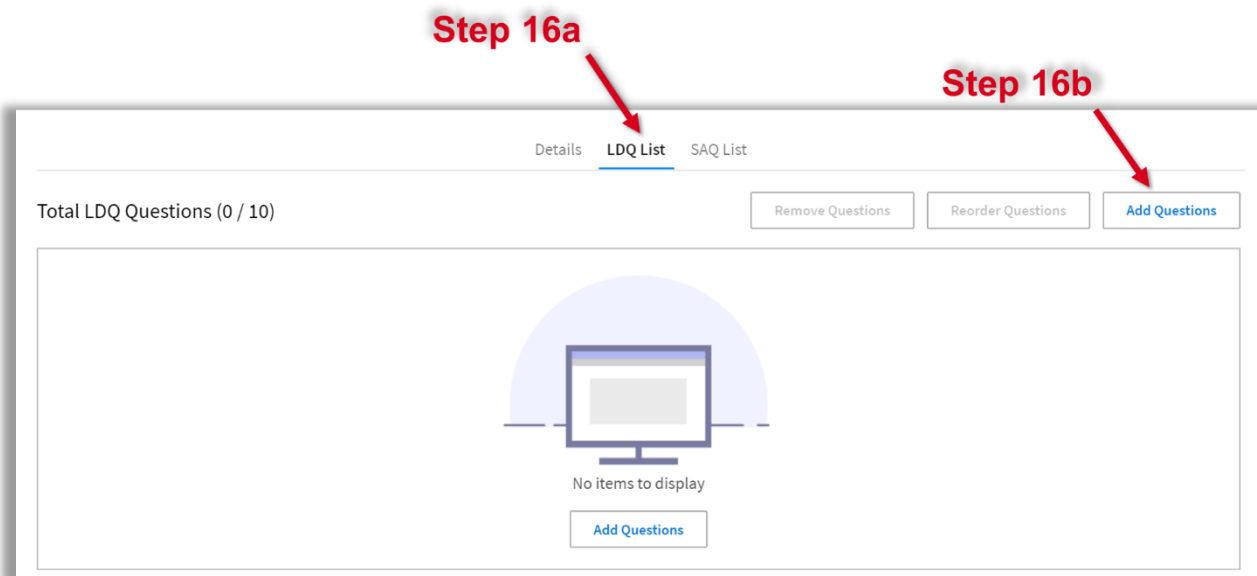
[Go Back](#) [Create New List](#) [Delete](#) [Add List to Survey](#)

- 15. Enter a Question List Name.** This saves all of your selections as one list. For future DEOCS requests, if you would like to use the same custom questions, you can simply choose this list name. Click “Save.”

Tip: If you do not name your question list, you won’t be able to save your questions and add them to your survey.

16. To add custom multiple choice questions:

- a. Click the “LDQ List” tab.
- b. Click the “Add Questions” button.



- c. You can browse through the available options by scrolling through the list, selecting a category from the drop-down menu, or typing in a keyword in the search bar.
- d. Select up to 10 multiple choice questions by clicking “ADD” in the box beside each desired question.

Tip: The number of questions you have selected will display in the header next to “Selected LDQ Questions.”

- e. When done selecting questions, click the “Add Questions to List” button and you will see all of your selections listed.
- f. You can reorder the selected custom questions by clicking the “Reorder Questions” button and you can edit your list by clicking “Add Questions” again and selecting or de-selecting additional questions.

Tip: If you have exceeded the maximum number of 10 LDQs, a warning message will appear in red in the header and you will not be able to save, publish, or add other questions until the appropriate number of questions has been removed.

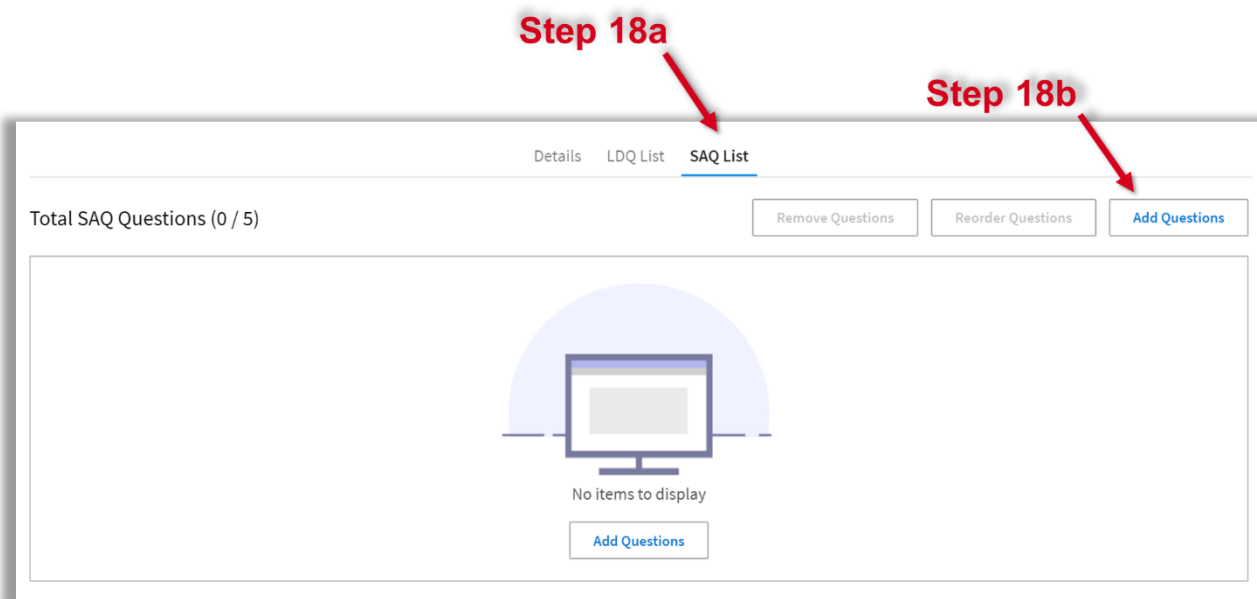
17. If you would like to add custom short answer questions, continue to step

18. If you are done adding custom questions, click “Publish” then “Add List to Survey” and continue to step 19. If you want to save the list for

inclusion at a later time but do not want to add the list to the current registration, click “Save.”

18. To add custom short answer questions:

- a. Click the “SAQ List” tab.
- b. Click the “Add Questions” button.



- c. You can browse through the available options by scrolling through the list, selecting a category from the drop-down menu, or typing in a keyword in the search bar.
- d. Select up to 5 short answer questions by clicking “ADD” in the box beside each desired question.
- e. When done, click the “Add Questions” button and you will see all of your selections listed.
- f. You can reorder the selected custom questions by clicking the “Reorder Questions” button and using the up and down arrows as desired. You can edit your list by clicking “Add Questions” again and selecting or de-selecting additional options.

Tip: If you have exceeded the maximum number of 5 SAQs, a warning message will appear in red in the header and you will not be able to save, publish, or add other questions until the appropriate number of questions has been removed.

- g. If you are done adding custom questions, click “Publish” and then “Add List to Survey.” If you want to save the list for inclusion at a later time but do not want to add the list to the current registration, click “Save”.

Tip: You must first “Publish” your list **before** you can add it to the survey. To make sure your list of questions made it onto the survey, return to the registration screen and scroll to the bottom. You should see the question list name on the bottom left corner of the screen directly above “View Additional Questions” button. If you don’t see the name of the list, the list **hasn’t been added**. Go back through steps 16 to 18 to add the custom questions.

19. Review any information you’ve entered and when ready to submit your DEOCS request, click the “Register” button.

Edit a DEOCS Request

Depending on the status of the survey request, survey administrators can edit most fields in the “Survey Details” tab. Use the table below to determine which fields you can edit for each status of a survey request. Once you are finished, click the “Done” button to return to the main page and view other surveys if needed.

Survey Request Status	What can you edit?
Draft: Survey request is being created/edited by survey administrator.	<ul style="list-style-type: none"> • Re-import new roster • Edit all fields on the “Survey Details” tab
Ready for Approval: Survey request has been submitted by the survey administrator and waiting for approval or denial from the commander/leader.	<ul style="list-style-type: none"> • Re-import new roster • Edit all fields on the “Survey Details” tab except for Commander’s information and Commander’s supervisor information.

<p>Approved: Survey request has been reviewed and approved by the commander/leader.</p>	<ul style="list-style-type: none"> • Add new participants to the roster. Existing participants cannot be removed, but you can add new participants by adding them to the original CSV roster file and re-importing the roster. New participants can be placed into existing subgroups, but new subgroups cannot be added. • Edit the survey start date (if survey has not yet started) • Edit the survey end date
<p>Denied: Survey request has been reviewed and denied by the commander/leader.</p>	<ul style="list-style-type: none"> • Re-import new roster • Edit all fields on the “Survey Details” tab except for commander’s/leader’s information and their supervisor’s information.

View Current and Previous Survey Requests

To access the “Survey Registration” page, from the home page, click “View Existing Survey Requests” or use the top menu bar and go to “My Applications - Survey Registration.”

On the survey registration page, survey administrators can view and filter through all of the current and previous survey requests they have created. Filters can be applied using the filter pane and this will allow you to narrow your search by Service component, survey status, registration name, administrator, commander, and/or survey start and end dates. You can also search by keyword. Clicking on a survey row opens the survey details page for that request.

Cancel a DEOCS Request

A survey administrator can cancel a DEOCS at any time **before the start date**. Steps to cancel a DEOCS depend on the survey’s status:

- **If a DEOCS is in “Ready for Approval” status:** A survey administrator can cancel the DEOCS. If the commander/leader tries to approve the survey without knowledge that it has been cancelled by the survey administrator, they will get a message saying the survey can no longer be approved because it was cancelled.
- **If a DEOCS is in “Approved status”:** A survey administrator can cancel the DEOCS any time before the start date. The “cancel survey” button will only appear before the start date has been reached.

- **If a DEOCS is in “Denied status”:** No action needs to take place to cancel the DEOCS. The survey will not field until it has been approved by the commander/leader.
- **If a DEOCS has already started:** A DEOCS that is already started cannot be cancelled, but a new end date can be selected to stop a DEOCS early. To stop a DEOCS, survey administrators can change the end date to today’s date in the Survey Details tab (noted in step 11 on page 4). The survey system will continue to allow participants to take the survey until end of day and will then close out the survey.

Steps to Cancel a DEOCS

1. **After logging in to your DEOCS Portal account** (<https://www.drcedirect.com/all/eca-portal-v2-ui/#/login/deocs>), select **“Survey Registration.”** The link appears in two places – on the main body of the page under “Survey Administrator” and in the top menu bar under “My Applications.”
2. **DEOCS requests will be shown in the middle of the screen. Click anywhere on the list to view the details of the request.**
3. **Click the “Cancel Survey” button and then “Submit.”** Your survey request is now cancelled.



The screenshot displays the 'Survey Details' page in the DEOCS Portal. The page has a dark header bar. Below the header, there are two tabs: 'Survey Details' (active) and 'Participant List'. On the right side of the page, there are two buttons: 'Done' and 'Cancel Survey'. A red arrow points to the 'Cancel Survey' button. The main content area contains a 'Registration Name' field with the text 'Moore 06.03.2020'. Below this, there is a 'Participant Import' section with a 'Browse' button. At the bottom left, there is a green button labeled 'COMPLETED'.

Next Steps after Registering a New Survey

Now that you've successfully requested your DEOCS, user accounts are automatically created for the commander/leader of the unit/organization and their supervisor. The commander/leader and their supervisor will also receive an automated email letting them know about your request. The commander/leader will need to approve your DEOCS request before the survey can start. Please read "How to Review and Approve/Deny a Survey Request" on the Assessment to Solutions website: <https://www.defenseculture.mil/Assessment-to-Solutions/A2S-Home/>

Once the commander/leader has approved it, you will receive an email with additional information and instructions on how potential participants can access your survey. If the commander/leader denies the survey, you will be sent an email with the reason for the denial. You can then edit any survey details and resubmit it for approval.

While the survey is in the field, it is important to monitor response rates. Please read "How to Manage a Survey in the Field" on the Assessment to Solutions website: <https://www.defenseculture.mil/Assessment-to-Solutions/A2S-Home/>

When the survey closes, DEOCS results will be made available in the DEOCS Portal within 72 hours; you, the commander/leader, and their supervisor will receive an email notification when the results are ready. Please read "How to Use the Interactive Dashboard" on the Assessment to Solutions website: <https://www.defenseculture.mil/Assessment-to-Solutions/A2S-Home/>

Contact DEOCS HelpDesk

If you have questions or have any problems requesting a DEOCS, please contact our helpdesk at:

- deocs@datarecognitioncorp.com
- 1-833-867-5674